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ABSTRACT

The booklet is written to give disabled people and their families, friends, and advocates basic information on how to effectively influence legislators, policy makers, program administrators, and political parties at all levels. Section I, which takes the advocates view, contains chapters on the challenge of politics, decision making, formulation of a plan, understanding the issue, communication with the representative, the role of time and circumstances, testifying before official bodies, and practical suggestions. Section II takes a disabled advocate's view with chapters on the structure of government, ways in which issues are developed in the political process, and steps to take in influencing public policy. (SB)

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Lobbying for the
Rights of Disabled People:
Views from the Hill
and from the Grass Roots

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Preface

Our authors have written this document to give disabled people and their families, friends, and advocates basic information on how to effectively influence legislators, policy makers, program administrators, and political parties at all levels — local, state, and federal. Much has been written on lobbying generally, but we felt a resource was needed which addressed disability and rehabilitation issues specifically and which described the actual efforts of disabled consumers to improve their well-being through direct political action. We also wanted to make sure we provided an insider's view of the workings of a legislative body (U.S. Congress) as well as a disabled advocate's view of how to affect the decisions of Congress as well as those of state legislatures and other government bodies.

We hope this document, *Lobbying for the Rights of Disabled People — Views from the Hill and from the Grass Roots* will encourage all disabled people to continue their fight to enter the mainstream of our society as equals.

View From the Hill

1. Introduction

Today more than ever before, people from all walks of life want to influence political systems at local, state, or federal levels. Unfortunately, many believe that politics is "dirty." They feel their ability to sway the system is limited. Lobbying, or the ability to communicate with key decision makers, is difficult they think. Individuals or members of small local organizations often feel they can't make a difference and that government is too complex to understand, let alone to affect.

While these are common thoughts, they are not necessarily true. The system at any level can be understood, influenced, and "beaten" if you know how it works and how you can work it! "Politics" is a word that often turns people off, yet all of us "play politics" daily although we don't necessarily think of it as such. Politics involves negotiation, compromise, tradeoffs, and accommodations.

For example, if you have only one television and different family members want to watch two programs presented at the same time, obviously, both cannot be seen. One possible accommodation would be that one week, one program would be watched, the next week, the other. Another way to resolve the issue would be a family vote in which majority rule would prevail. Still another accommodation, if money were available, might be to buy a second TV set.

Politics has been called "the art of the possible." It involves the process of making one decision versus another. If you think about all the decisions you make in a day which involve money or other people, you will see that you are already "politicians."

Politics, or affecting the system, can best be described as a game with many players. Some people make decisions; others want certain decisions made. To play the game, one must understand the positions of the players and how they fit in the system. It is important to know the rules by which each player plays. For example, there are subtle distinctions between the way a city or county government works and the way the Congress of the United States does. The sophistication of the issues varies, as does the complexity of the rules under which political bodies operate. Therefore, the more you understand political bodies, the more you will be able to influence their actions.

It is most important that you as an individual, or your organization, know what you want. People come to politicians or decision makers and say, "I've got a problem." However, politicians and decision makers are not mind readers. They might understand the problem, but unless you can recommend a solution you may be disappointed in the resolution, or more importantly, in the lack of resolution.

To affect any system, it is essential to first understand the people who control it and make decisions, and why their decisions are made.

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As a general rule, public servants, whether elected or appointed, are hard-working and dedicated to their jobs. Although you may question the necessity for their work, they generally take pride in their accomplishments. It is also important to understand that although you may think your position is right, others may not.

2. The Challenge of Politics

To illustrate this, try this exercise with any group. Ask everyone to fold his or her hands together. Then check to see how many put their right thumb over their left, and how many put the left over the right. In most groups, it will be about 50-50. Now if you ask all participants to reverse their positions and put the left finger over the right or vice versa, the participants will probably acknowledge that the new position feels uncomfortable. That's because they aren't used to it. Through this little exercise, you can begin to see why it is difficult to write a law or take action to solve a problem or satisfy a perceived need. Because of the individual differences in every part of our society, not everyone wants to address and solve problems, or achieve goals in the same way.

Influencing the system today is made even more complex and difficult because of limited resources. In the past when there were automatic annual increases in federal, state, and local budgets, various forces could compete with one another, argue about how to split the new money, and achieve their objectives. Today, however, even though their causes are admirable, their needs still exist, and their arguments are still sound, groups are competing against one another for the same scarce dollars, and are often fighting to keep what they have. Let us now look at the decision-making process involved in allocating scarce resources.

3. Making Decisions

In every public school setting, policy makers must decide how much money to allocate to special education, and how to allocate resources for specific problems or programs within that area. Let's illustrate the allocation process in the area of the handicapped.* The "handicapped" as a group are not homogeneous. Blind students' needs differ from those of deaf persons; deaf people have different needs than physically

* The words "handicapped" and "disabled" do not have the same meanings. Because in most legislation, the term "handicapped" has been used, we use it in this paper, even though "disabled" may be more accurate.

handicapped people do; and their needs differ from those of retarded persons. Therefore, under the umbrella term "handicapped," are many different groups whose needs are not necessarily compatible, yet they compete for the same resources. At the same time, all the handicapped groups compete for funds against the football team and the art, English, science, and every other department within a school system.

We can gain perspective by using a hypothetical situation. The local school board is making up its budget for the next fiscal year. Issues before the board are:

- Whether to buy new uniforms for the basketball team to help promote attendance at the games, to increase community interest, and above all, to produce revenue for the school district;
- Whether the music department should be permitted to buy new instruments to provide more opportunities for students to play in the band and orchestra, and thus enhance the school's ability to win a statewide competition;
- Whether to accommodate parents of severely retarded students who want their children educated within the local school district special self-contained classes; and not in a state institution where they have lived for the past five years;
- Whether to oblige parents of mildly retarded students who want their children removed from special classes and put into regular classes with "normal" children and given supplementary assistance so they can function "more normally;"
- Whether to accommodate deaf parents of deaf children who want the schools to purchase a telecommunication typewriter (TTY) so they can communicate with the schools;
- Whether to allow the science department to replace old equipment since students find when they go to college, they can't keep up with their classmates who attended schools with more sophisticated equipment.

Before making decisions for desired change, consider how funds are committed to a particular service or area of interest. Regardless of how much money is available, or which approach is taken to satisfy a particular program strategy, some will question whether the funds are adequate. At the same time, others will charge that too much money is already being spent and that the government has no business in the area of your interest in the first place. Your attitudes reflect personal values, judgments, backgrounds, and political and philosophical outlooks. Decisions in the federal, state, or local bureaucracies, are not

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made in a vacuum and must be considered in the context of what exists, what resources are available, and what constraints are placed upon the decision makers.

4. An Exercise in Decision Making

It is easy to criticize the President, Members of Congress, members of state legislatures, governors, mayors, superintendents of schools, or other public officials about specific program choices or budgetary decisions. But to gain perspective, assume that you are in the position of making recommendations to these decision makers. Assume that the President (or any other official listed above) asked you to be his or her number-one advisor for the handicapped in the federal (state or local) government. You are directed to develop a program to help "as many handicapped persons as possible." S/he does not mention children versus adults, or limit the types of services, handicapped people to be included, or funding. S/he will allow you to do anything as long as you reach the objective of helping the maximum number. S/he requests your best advice and judgment. What would you recommend?

- Take a few minutes and jot down your major ideas.
- Take another minute and list your five most important recommendations.
- Estimate how much you think your proposals will cost.

During the last few minutes your adrenaline probably flowed from the excitement as great ideas raced through your mind. Of course, this exercise is unrealistic and was nothing more than a fling in fantasyland. It is highly unlikely that any President, governor, or mayor would ever have made such a request. If any of these officials had been disposed to commit large sums to handicapped persons, s/he would probably say, "Because there is a \$60 billion (or whatever exists) deficit this year, I must place some budgetary constraints on you." S/he would then advise you that instead of giving you unlimited funds, s/he would give you a total of say, \$1 billion in new (heretofore uncommitted) funds to perform your assignment. At this point you should write your goals once again to keep within the new dollar restrictions.

If this situation were real, you would definitely have faced restrictions before you got an opportunity to share your original ideas, no matter how good they might have been. Every federal, state, and local agency; program; office; or employee has constraints. All their constraints are more severe and rigid than those just described. To be even more realistic, you must know that it is highly unlikely that you would have been given \$1 billion in new money. Most likely, the money would have

been taken from some other service areas, and the loss to those areas would have generated opposition from any "loser" constituency. In reality, if such an assignment were ever given, there would be many more restrictions. The President (governor or mayor) would have to say, "We already have several programs for handicapped people, such as PL 94-142, Vocational Rehabilitation, and Supplemental Security Income. How should we rationalize these already-existing programs? Should we abolish some or all of them and start new ones or expand the existing programs?" Clearly, a decision to help disabled persons cannot be made in isolation. All decisions must accommodate a range of political, economic, and philosophical considerations.

If your project is going to cost \$1 billion or \$1 million, do you know how much money that really is? If you request \$1 million, what will it buy? Assuming it is a federal project, and the money is going to be divided equally among the states, divide the million dollars by 50.

This doesn't include Puerto Rico and the Trust Territories, which also receive federal dollars (\$1 million divided by 50 = \$20,000 each). What will \$20,000 buy — one teacher, two secretaries? Divide \$1 billion by 50. Your state would receive \$2 million from a billion dollar federal appropriation, if the money were given equally to all states.

Look at the \$2 million your state would receive in another way. Just because your state gets the money doesn't necessarily mean that it would go to your particular program. The money would have to be divided among a number of programs. If the state received \$2 million and wanted to divide it equally between all the cities in the state, how much would your city receive? Should small cities receive as much as large ones? Should funding levels be based on population? What do you do about the counties — should the counties get some money? The point is, each time money is divided, it decreases the amount available.

Assuming that you do have \$1 billion in new funds to spend and you want to establish a new program, you must recognize that \$1 billion will not serve every handicapped person in America. At this point, you must decide which handicapped groups should be served. After that, consider the kinds of services you will provide to them. Will the services emphasize quantity or quality, or will you try to combine both? To answer these questions, you must first make other judgments and decisions. Should only poor handicapped persons be served? Should services be provided for the "near-poor?" Should individuals with only specific physical or mental disabilities be served?

The task is not as easy as jotting down ideas for programs. You, as the President's (governor's, mayor's) advisor, must make difficult value judgments. You will not be able to do everything you think is necessary. Also, you must realize that many people will not agree with your choices.

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Up to this point you only considered the question of which and how many persons you would serve, but what about the quality of services provided? Assuming that no one intentionally establishes an inferior program, how will you determine what quality level should be achieved? Let's say you decide on a program for handicapped children. Should the Headstart program, for example, with all its supplementary services and professional personnel be used as a yardstick for measuring quality? Should it be the model for your program? Are all those services and people really necessary? And do they, in themselves, constitute or guarantee quality? If Headstart is of high quality, why not simply expand that program rather than start a new one? Should educational enrichment be a mandatory part of the program? Should new facilities be built, or should existing buildings be used? Should any restrictions be placed on financing in this area? Are professionals necessary to operate these programs, or can paraprofessionals or nonprofessionals do the job as well? What is the ideal staff-child ratio? How do you know? Should parents be involved in the program? Should they serve as paid staff or as volunteers? How many meals or snacks should be served? How many hours a day should the program be open?

Such questioning can be adapted to virtually any given area. For example, if a school system wished to establish or modify special education programs for educable mentally retarded students, many of these questions could be asked. In addition, questions relative to specific class size could be included, such as: What should the maximum class size be? In many states, fifteen is the maximum class size, but why not ten, twelve, eighteen, or twenty? Could one teacher with an aide handle and adequately teach twenty to twenty-five children? Should all handicapped children be sent to a single school, or should they be included in regular school classrooms? How much would transportation cost in either case? What special services over and above those normally given in a special class should be provided? When you begin to answer these questions, remember that every decision may cost money!

5. Where Do You Begin?

First, find out who will make the decision. If it is a five-member board, where does each member come from? What do you know about them? More importantly, who are the "power brokers" or the most influential people within the board? (In any organization in which decisions are made, the power of some members to influence others differs greatly.) Will the decision be made in a subcommittee or will it be made by the full board? Who in your organization, or among your contacts, knows any of the board members personally? Do you know anyone

who has the confidence of those board members who will intervene on your behalf? Are any of those board members already on your side? Does any board member have a relative or friend affected by any of the problems that will be addressed? For example, does a board member have a deaf relative? If so, that person would probably understand the potential usefulness of TTYs in the schools. On the other hand, don't waste time on lost causes! If a decision maker's son is on the school basketball team, you have a fair idea of how s/he'll vote.

Decision makers usually do not have much personal contact with (or understanding of) very specialized areas. Therefore, begin by educating and informing them. The most basic form of education entails providing members with substantive information which clearly (not emotionally) spells out why your particular position is necessary, and why they should vote for it. If a board member is elected and represents a particular area of the city, and if significant numbers of people there will be affected by the particular decision, then those affected should voice their feelings. How are other parts of the city affected? Remember, every elected office holder must run for reelection. If there is overwhelming community support for any one of these positions and those feelings are conveyed to the board member, they certainly won't go unnoticed. Also, what will a particular vote mean to the individual's district? Will it mean more jobs? More money for local businesses? Less crime?

Understand that working toward a specific goal at the local level often varies from efforts made at the state and federal level. State and federal laws and decisions are usually general in scope. They are written to accommodate all the differences among all the states, yet they are specific enough to accomplish the lawmakers' aims. On the local level where a decision is being made by a board of supervisors, a city council, or a school board, decisions tend to be more specific and understandable, and they usually affect identifiable places or people. Efforts to influence the decisions made at the different levels, however, follow the same basic patterns and principles. The one exception to this is: Decisions at the local level tend to be more immediate; their effects can be seen and measured right away; whereas, working to get a state or federal law passed or a decision approved may take years. Whatever the level, the one common requirement is for consistency and dedication to a single goal. You must concentrate your efforts.

People demand more and more from government. Let's assume that you know specifically what you want! But do you? Do you know what the cost will be? Will what you want benefit one school, one hospital, a particular center; or will the effects be city-, county-, state-, or nation-wide? How many people will have to be employed to carry out what you want? How many people will be affected?

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The next time you want the federal, state, or local government, or your local school system to start a new program in an area of special concern to you, investigate what is already authorized, funded, and operating. Programs and legislative authorities already exist in almost every conceivable area, but the general public is often unaware of them. There are so many programs available to meet the varied needs of special interests that they frequently overlap or duplicate each other.

6. Know the Players

If you want to influence any system, start by assessing where you are, what you know, and who you know.

- Do you know the name of your council member, state representative, Member of Congress, and Senator?
- Do you know any of them personally?
- Do you know anybody who does know any of them personally?
- Have you ever contacted any of them for any reason either in person or by letter?
- Have you ever worked to elect any of them?
- Do you know where their offices are?
- Have you ever attended any function where they participated?
- Did you meet or talk to them?
- Have any of them ever addressed your organization?
- Have any of them ever done anything to help meet your goals or those of your organization?
- Have you ever thanked them when they did something favorable for you?
- Have you ever written to protest something they didn't do or that you disliked?

These questions are critical for those who want to affect the system. If you have been unable to answer "yes" to at least half of them, you can begin to understand your previous inability to influence the system.

Suppose you have thought about all the questions and issues, assessed who and what you know, and have decided to address one issue. What can you do? You, as an individual working alone, can affect the system — especially if your issue is not too controversial and you are persistent. However, if the subject is controversial, involves change, or is costly, the more people involved, the greater the chances of success. Only rarely does an individual working alone succeed under these conditions.

Knowing the players in politics means you recognize that election is the name of the game. Always remember an elected official can have great philosophical convictions, but if s/he can't stay in office s/he can't apply them. People write to elected officials complaining about high taxes, government spending, and say they want budget cuts or they will vote them out of office. As a result, elected officials closely examine the amounts of money involved in proposed legislation. At the same time, every elected official gets letters saying "I know that inflation is running wild. I know that we have to cut spending, and I'm with you in every way possible, but please don't cut my program." This has nothing to do with philosophy. It has to do with the substance of one program against the other. Elected officials must weigh the balance and decide which program has a better opportunity of helping different groups.

Another way to influence political decisions is by getting to know the politician's family. If a spouse has a particular interest, or has a relative affected by your cause or concern, working with the spouse may help your cause greatly.

Knowing the players also implies that you know who is with you and who isn't. If a committee chair is a longtime advocate for your concern, don't waste your time discussing philosophy. S/he doesn't need it. Use your time more advantageously by persuading those who aren't on your side. With your friends, simply give them the facts and tell them what you are doing.

When you know the specific interests of the legislators you are trying to influence, you can relate your testimony to their particular concerns. One effective technique is to be well enough prepared to be able to alter testimony "on the fly," so that when another Member arrives s/he can be recognized with, "I am pleased to see X has arrived because of his (or her) longstanding interest in Y, or because of the relevance of this issue to Z's district."

Once you get to know your legislators, you can visit them and discuss your concerns directly. If you make an appointment with a Member and arrive on time only to find out that s/he has been called elsewhere and can't visit with you, ask if you can walk along with the Member and make your case on the move. You may have three to five minutes. That is why you must be clear, concise, and able to state your case in two to three sentences. Even if you have an opportunity to meet in the office, you will be lucky if you get ten minutes. If you get fifteen, that is probably more than s/he will spend with the family that day. Regardless of the length or location of the meeting, provide the Member with a one-page paper summarizing your needs or problems as well as your solutions. Don't expect it to be read on the spot. Often, if you meet with a Member on the run, the paper will be tucked in a

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pocket. S/he may appear to forget all about your paper because ten other people just like you, plus several Members, stopped him or her along the way to make requests. Generally, when s/he returns to the office, all the pieces of paper will be reviewed and actions will be proposed. It really helps if you are from the Member's state or district; that will certainly guarantee some personal attention.

In getting to know and work with legislators and their staffs, don't restrict yourself only to the majority party. There is nothing that says you can't have an *entré* to both the majority and the minority Members, and you never know what sort of allies you will develop.

Regarding your legislative interests, know who is saying what, and why. Remember that individuals representing administrative agencies may say things they may not necessarily believe, but which reflect the position of their boss or agency. This is a fact of life for most people in government. If these people don't reflect such views, they risk losing their jobs.

Recognize the distinctions between committee staff and a legislator's office staff. The functions of people who work on committees and those who work in the office of the Members differ. As a general rule, people who work in the latter are familiar with issues and people within the Member's district, but have only a superficial knowledge of particular pieces of legislation. On the other hand, committee staff generally are experts on particular pieces of legislation. They rarely know much about a Member's district, unless they come from it themselves. Regardless of where a staff person sits, s/he can be equally influential and helpful to you.

Finally, don't be impressed by what people say, only by what they do. Don't be impressed when people give you a token sign or something symbolic. It is very easy to buy off people with a kind word or sympathetic gesture.

7. Plan for Success

Once you have identified an issue and know specifically what you want to do, you must decide who will do the work and how. Will you use an existing or an *ad hoc* group? Will it be a combination of many groups? The keys to any successful venture, regardless of size, are persistence and commitment to achieving the goal. For even the simplest accomplishment, a year or even several years may be needed. If you have a full-time job, a family, and other commitments, how much time will you be able to devote to achieving the goal? When you consider all the steps which must be taken, you will see why many people must be involved.

To accomplish many goals it is necessary to build a network of people who provide personnel, money, and contacts. It can be made up of friends who share your particular concern. It might have as its base an existing organization of which you are a member. It might be made up of many organizations in an *ad hoc* fashion. It could be a coalition of many groups and organizations who don't necessarily have the same mission but who can cooperate for a single purpose. Whatever the mechanism and structure, it is important that everyone involved have a clearly defined role that best utilizes their time and talents. Leaders will have to be designated. The organizational structure should link everybody together in a rational, compatible way.

Whatever the reasons for coming together, everyone must be thoroughly conversant with the issue, and must understand the government or other system with which they will be working. It's one thing to understand your own issue, it's another to understand the arena in which the battles on your issue will be fought.

One of the most important tasks for any network is to transmit accurate and understandable information quickly. One method of communication on political issues is a telephone network based upon the pyramid. Assume that somebody determines that an action must be taken today. That person calls two people who have already been designated as the initial contacts. Those two people each call two others. Those four people each call two. The eight people call two, etc. In a telephone network backup people are essential so that the links are never broken. A telephone network works well when immediate action is needed.

However, if immediate action is not necessary, a newsletter or other form of written communication can be used. Producing written materials takes time and money. Any cause which involves many people will also involve spending money at some point. You must develop methods to cover your costs.

As your network begins to function, and you know your players, you can begin to identify their strengths and use them appropriately. Not everyone is capable of testifying before a committee, nor can everyone lobby legislative bodies. Not everybody has the time ever, if they have the talent and ability. Therefore, appraise the time and talent you do have, and plan to use it in the most effective way.

You can start small! Then, build your base of people who are dedicated to the cause and willing to commit their time, money, or both. Any effort will take time. No campaign for change can be achieved with a one-shot effort.

View From the Hill

8. Understand Your Issue

Once you find a nucleus of support, build your knowledge base. Make an objective judgment of what you want to achieve, and then develop your strategy. For example, if there is a piece of property in your city that you want turned into a park, the first thing to do is to find out:

- Who owns the property?
- Is it public or private land?
- Who or what will be affected if a particular property becomes a park?
- Would certain land interests or developers like the property for commercial use?
- Where will you get the money to buy the property?
- Who are your opponents? What are their power bases?
- Which decision makers will you have to influence?
- What are the issues?
- How many people agree that the property should become park land?

Whenever you want to affect local, state, or federal policy, the same questions must be asked. What is the present policy, and why is it in place now? Who is really concerned about it? Is it just you and a few others, or does it affect a wide range of people? How controversial is your cause, and more importantly, how "attractive" is it? Can people understand and identify with your issue? Will they be "turned on" by it? There are definite partisans on such issues as abortion and gun control. Thus we don't have to evaluate whether these issues are "live ones." But suppose you advocate something like the Theodore Roosevelt Memorial Commission? At this time in history, it is doubtful whether many people would rally around it as a cause. Is your issue substantive? These questions must be asked, and their answers must be evaluated. The first step in your strategy is to state the problem so it is readily understandable and can easily excite people. For you to win, you must be able to explain your issue in no more than two sentences.

Suppose you want to change a funding formula of a certain law or agency. Such formulas are generally very complicated. You don't need to explain all the details of the formula to get people to fight to change it. It is generally sufficient to say, "Under the existing formula we don't get our fair share. If we can change it, we should receive twice as much as we do now." That's easy to understand, and people can have feelings about it.

For any effort to succeed, everyone involved must understand the issues. If network members have a chance to tell a Senator that "We have a problem" but they are vague about what they want and don't fully understand the issue, then they will not be able to communicate effectively. Such people may even confuse the issue. The contact will have been wasted, and the goal will not be advanced. If you write to a Congressional office to effect change, and say, "A great program is going to be terminated Please vote to save it," the legislator (or staff member) will try to respond. If they don't know what the project is, they will have to figure out whether it is federally or state funded. They may also find that the project is a specific agency in your community that is in trouble but the law authorizing it is not being considered at that time. It may be that a federal or state agency is going to terminate the funding, or that the problem is local and has nothing to do with the law itself. When a federal agency is considering termination of a program, and you want to stop it, what you need is political pressure to get the agency to reverse its position. You must spell this out, and not simply ask the lawmaker to vote to save it.

As your network becomes more sophisticated, it will begin to understand that when policy makers are pressured they look for the source of the pressure. They ask: Does it come from one part of the city or one school district? Is it city-wide? Is it county-wide? Does it come from all over the district or state? Is it a problem within one school, one classroom, one agency, one organization? Therefore, plan your strategy so there appears to be broad support for your goals.

To fully understand your issue you need to know the specific funding source for your program. If it is a state-funded program, realize that state senators and house members are usually eager to hassle the governor's department heads. Be careful when you play off one against the other, but know that it can be done. It's best to work closely with both sides.

9. Communicate With Your Representative

Not everyone has the time, opportunity, or money to go to Washington or to the state capitol to tell his or her elected representatives his or her thoughts and problems or how they should vote. The easiest, cheapest, and one of the most effective ways to communicate is by letter. However, letters must be timely and precise. Your letter will compete with many others received in that office that day. Some Members of Congress receive a few hundred letters a week, while others receive many thousands. Mail generally falls into the following broad categories:

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- News on legislation and issues
- Requests
- Casework involving constituent problems
- Invitations
- "Thank you's"
- "How could you's"
- General politics
- Miscellaneous comments from people ranging from "kooks" to admirers.

Because many offices receive so much mail, bear in mind certain basic ideas if you want your letter to have an impact. It makes no difference what kind of paper you use; it can be stationery or looseleaf paper. The letter should be pithy, but still include all the facts. If you are writing about a particular bill, be sure to include the name of the bill and the bill number (e.g., HR-1234 if it is a House of Representatives bill; S-4321 if it is a Senate bill). Bill numbers are needed because in each Congress tens of thousands of bills are introduced.

To be meaningful, your message should be aimed at a specific piece of legislation. Present the Member with a clear, concise argument either for or against a legislative issue. Also state the reasons for your particular position. Most important, show how the particular issue will affect people within the Member's district or state.

Whatever you do, don't send a pre-printed or form letter that hundreds of other people are going to copy and send to the same Member. Don't use clichés or slogans; use your own words. Only they will be heard and make a difference. Nothing looks worse to a legislator than an obviously orchestrated campaign. If an elected representative sees fifty or one hundred identical letters s/he will tend to disregard them. There is no substitute for one carefully worded, thoughtful letter from a Member's district. Several years ago, a bill to extend the Older Americans Act was being considered by the Congress. Members and staff were stymied on solving a particular problem. A woman wrote from a Member's district. The handwritten letter said, "I'm sixty-eight years old. Here is a particular problem I am having and this is what I suggest you do." She added, "I don't know anything about writing laws, but I do know that this is one way to solve this problem." As it turned out, that was the answer the committee was searching for, and her idea was incorporated into the law.

People wonder whether anybody pays attention to Congressional mail. This example shows that one letter can make a difference. Today, most letters get some attention because they are from the people who

elected the Member. Members are more conscious than ever before that they must accommodate the people back home. Congress has turned over its membership more than seventy-five percent since 1972. Any Member during that time who didn't attend to the people back home is probably out of office by now. Many defeats during the last eight years have been attributed to Members taking their constituents for granted. Another factor to remember is that all Members have the same importance today; a freshman may have as much clout as a twenty-year veteran committee chair.

At this point, we should note that single-issue campaigns, consisting of many thousands of letters on an individual issue (such as abortions and gun control) usually receive a standard answer on the Member's position. These letters are measured by quantity rather than by content. Members will generally use those letters, particularly those from their own districts, to justify their positions if they are compatible. They may reexamine their positions if substantive points, particularly from their own constituents, are made.

Since the volume is generally great, Members will probably not read all their mail. In fact, the majority of Members read only the most substantive comments. Even if the Member does not personally read the letter, somebody in the office will. Significant letters are always brought to the Member's attention. This is why if your problem requires casework, you must clearly describe it and suggest potential solutions. If you are stating your position on a particular bill, you should clearly identify what you seek.

In addition to keeping your letter short, including specific background information, and focusing on one subject, you should realize that the timing of your letter is critical. If you write your Member about a bill that might not come up for a vote for six months, chances are you will get a *pro forma* response. But unfortunately your letter may not have any impact. If your letter arrives after the vote, it will have no effect. Clearly, timing is as important as all the other factors.

Become as much of a "politician" as your elected representative is. The possibilities for you to meet your Representative are unlimited. Most have local offices and spend much time in their districts. If you can, make an appointment to meet him or her. Once you have met your Representative, and have developed a personal relationship, then when you write in the future, you can personalize your letter saying "Dear Tom" or "Dear Shirley." A personalized letter will get special attention in the office.

One of the best ways to "seal your friendship" is to write a letter to the Representative following any meetings, particularly if the Representative helped you. The first letter could be a "thank you" letter. Be careful not to abuse the privilege. Simply because you have a

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contact with a Member doesn't mean that you should write on a daily or weekly basis. Write whenever you have an important reason.

Telegrams generally are a waste of time and money. They are usually too short to say much, and they rarely make a difference. Mailgrams, if they are timely, can provide a useful tool for communicating because there can be more content in them. Although they will probably not contain any new information that will turn a vote around, they can tend to reinforce your Representative's stand.

10. Understand the Role of Time and Circumstances

Other variables to consider are "time" and "circumstances." Even with the best planning, strategy, and contacts, other factors will often affect you and your position. If the time or circumstances are not right, your objectives, no matter how valid, may not be achieved. The following are some basic concepts regarding these factors.

- Circumstances include fate and public sentiment. These can often be controlled or manipulated. You can create the atmosphere for the crisis or cause; you can keep issues alive. Dramatize factors and events to produce a positive effect. Negative publicity can dull or completely ruin a good cause.
- To achieve success may take years. Be flexible; those who cannot or will not compromise rarely win. Don't get locked into one position. (A rigid position formed in 1976 might not fit into factors or circumstances at work in 1981.)
- Thoroughly understand all sides of an issue. Recognize that for every idea there is at least one opposing idea, or another way of accomplishing the same thing.
- Understand the opposition and help to defuse it; recognize that it is not always or necessarily wrong.
- Be prepared for the known and the unknown.
- Recognize where your cause fits in the priorities of the majority of people throughout your city, state, or the nation.
- Often your goal (a law, specific funding, or a specific policy decision) can become so controversial, or the circumstances or timing surrounding your goal can get so clouded, that the legislation you supported may be killed.

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- In the process of compromise, even a single concept can become confused and complicated when the pressures are great enough and when attempts are made to satisfy more than one vested interest.

11. Testify Before Official Bodies

In the following sections we will describe how to effectively prepare, present, and follow-up on testimony before official bodies. Although we refer to "Member" and "Congress," the guidelines we offer can be applied at all levels of government.

Lay the Groundwork

A public hearing is only one step in the process and it is important that you not focus all your energies there. By developing a rapport with the staff of a committee and a Member's own office, as well as with the Member, and by meeting with Members both at home and in Congress, you lay important groundwork. If you do this well, the five or ten minutes you get to speak at a hearing will be icing on the cake. Don't think that because you did well at a particular hearing, everything you want will be accomplished. Follow-up by you and many others will be needed. Also, even though you have gotten a bill signed into law, it will still be necessary to get dollars appropriated so that those laws and programs can be carried out. The process is continuous.

Theoretically, Congressional hearings can be held almost anywhere. There is no set rule about hearings outside Washington. It is totally up to the chair or Members of a committee. They often tend not to travel because the press is critical of "junkets." The press generally interprets any trip outside Washington, regardless of the destination, as frivolous. Quite the contrary is true. Possibly the most effective way to influence Members of Congress is to get them to come to a city to see the problems first hand; to hear from people at the local level rather than from lobbyists. If you want to hold a hearing in your district, begin by working through your elected Representative. See if s/he can get the committee to travel to your location. If so, arrange for full press coverage.

Laying the groundwork involves understanding the roles of the various committees before whom you may testify as well as the differences in hearings. Authorization and appropriations committees have totally different missions and memberships. Authorizing committees originate the program, tell how it will work, and set the spending levels necessary to carry out the program. Appropriations committees provide the actual dollars to operate the programs.

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Authorizing committees tend to hold hearings on one subject and to get into it in great detail. As a result, your time before an appropriation committee will be shorter. Also, it is likely you will find your testimony sandwiched between that of groups with whom you are competing for the same scarce dollars. It is possible that on the same day, education, health, aging, and handicapped groups will testify on the same bill. As a result, Members have to jump from issue to issue very quickly and have little time to immerse themselves in all the details.

Although the full committee decides on final action, the bulk of the work and the initial decisions are made in subcommittees that do in-depth evaluations and analyses, and make the basic recommendations for the final bill that will go to the full committee. Although the full committee can change any bill completely, generally subcommittee recommendations are accepted.

Laying the groundwork also requires you to keep in mind that even people with the same problems do not necessarily have the same interests and priorities. Therefore, it may be difficult to form a really united front. There is much diversity of opinion in most legislative bodies. Approaches are usually philosophical rather than representative of a particular party. Accept the fact that reasonable men and women are going to differ. Your job is to recognize these differences and turn them to your advantage.

If you belong to an organization which doesn't necessarily have a position, or which is not involved with the subject of your concern, it might be possible to get the group to support your cause. People in other organizations may be able to influence decision makers.

In preparing to testify, you should completely understand all the major issues that have been raised in the program or subject area so you are not embarrassed at the hearings.

In the preliminary stage of your campaign, you should also learn something about the districts and personal backgrounds of the committee Members. It will assist you both in anticipating questions and in understanding the Member's frame of reference when a question is asked. You should understand how the issue affects the districts. You should also be aware of Members' previous involvement with the issue.

Remember, as you work, to keep your constituents and supporters informed. Don't go off as a lone eagle, because you may complicate or cancel out an overall plan.

Plan to Testify

Generally, if you want to appear before a committee, all you have to do is contact the committee staff. Usually it is enough to say, "I understand hearings will be held on such and such a date, and I would

like to appear as a witness." Your being heard, depends upon the number of days the committee is scheduled to hear public witnesses. Sometimes due to limited time, you will be asked to submit a statement for the record. This statement will appear just as though you had testified personally. The statement becomes part of the history of the bill.

Copies should be delivered at least twenty-four hours before the scheduled hearing. It is simply impossible to absorb the facts and details of a statement during a hearing. There are too many other distractions — phones, visitors, staff, bells, and votes. Your statement will have a much greater impact and the questions will be much more specific and helpful if seen ahead of time.

Preliminary meetings with Members can be valuable for identifying issues for discussion in hearings. Such informal meetings can also foster the essential sense of familiarity, trust, and confidence. A witness may even want to suggest such informal meetings in advance of the hearings.

Prior to a hearing, call the appropriate staff to ask what concerns may be expressed during the hearing and what points should be covered in the written statement. Continuous contact alerts staff to problems and gives them a practical understanding of your objectives. Don't be discouraged if you don't get to see a particular Member but have to meet with the staff. You will probably save yourself a lot of time and work if you do speak to them. Remember, they are in a position to influence the Members' judgments and votes.

Realize that members of the staff may not know the subject as well as you do. It is critically important for you to realize that often people who make decisions which affect the lives of many may not know as much about the subject as you do. You may be an expert, but the fact remains that they, not you, have the final vote. Even though they may not know all the answers, be careful not to talk down to them. On the other hand, many Members and their staffs have worked in subject areas for years, and although they are not trained in those areas, they have become very knowledgeable about them.

Don't ignore any Member or staff person even though they are not on the particular committee which you are trying to influence. Remember, people talk to one another and you never know when somebody may be able to help your cause.

Although you shouldn't do it too often, use a celebrity who will get the Committee's attention in undreamed-of ways. If you do, make sure s/he knows the subject. An example of an effective "star" who testified before a committee recently is Nanette Fabray. The first thing she did when called to start was to move her lips and speak soundlessly. After a minute she said to the Members, "You have now

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just experienced what it is like to be deaf." Everyone woke up and paid attention!

It may be possible, once you have a relationship with staff, to give them written questions which you are prepared to answer. This will supplement your testimony and give you an opportunity to emphasize issues which will help your case. There is no way that a Member can be made to ask all your questions; s/he may ask only one or two. If you see that happening while responding to one question, you may take the opportunity to throw in some of your other points.

Prepare Your Testimony

Effective testimony begins with well prepared documents such as brief statements, good tables or graphs, and clear illustrations and examples. If you use charts, make sure they are accurate, consistent, and eye catching. If large charts are used, be sure to use a reduced version in your written testimony. Use slides and overhead projectors sparingly.

Members, as well as committee staff, generally work in several areas and have a broad overview of more than one problem. Arguments are often similar across all the areas (handicapped, aged, children, poor). When you advocate for a program, it is not enough to say that a particular group has "unique needs," or "society has an obligation to help a group or cause" or "if the federal government does not take care of them, no one will." These arguments are presented for every bill or program before the committee. You must recognize that Members are always being pressured by varied lobbies and interest groups. So you must be able to demonstrate why the particular needs or positions you advocate are, indeed, unique and worthy of support. In short, avoid clichés.

Be sure to frame recommendations in terms of specific legislative changes. Providing a specific idea to accomplish the desired ends is as important as graphic and real testimony. Don't worry about using legal language; attorneys will appropriately draft the bill for the Members.

Testimony should be short, stimulating, and somewhat overstated to incite the Members to learn about your programs and arrive at judgments concerning appropriate action. When they are involved in a dialogue in which their questions have been answered, they will retain the lessons much better.

Make your testimony as positive as possible while being truthful. Talk about what works, not what doesn't. Avoid using all your time discussing the inadequacies and failures of a program. Cite, wherever possible, good examples in the Members' states or districts. If you are asking for additional funds or legislative authority, talk about how the expansion will enhance what works.

Don't overkill with excessive detail just because you know all the bureaucratic complexities. Tell the committee what time it is — not how the watch works.

The best testimony is graphic and real. The stock in trade of politicians is solving concrete problems for identifiable individuals. Outstanding testimony often involves bringing real people from the field — people served or affected by the program.

Consider using a case-study approach to give life to a presentation. Have real people tell their story. Then draw the appropriate lessons from the case study and demonstrate with the backup data "for the record" that the problem illustrated by the study is of general concern. Politicians are accustomed to solving constituents' problems and responding to real peoples' needs.

Avoid attacking any group in your testimony. Saying things like, "Well the blind (or a certain minority group) are getting such and such" may not help your case and could even result in your losing points. You may be talking to a Member who has a blind person in his or her family or to Members who have large black, Spanish, or other minority constituencies. You don't have to shoot somebody else down to make your case.

Present Your Testimony

Even if the Members are not, you should be prompt. Be prepared to start immediately when the Members have arrived. Do not be surprised if some Members arrive late or drift in and out. Introduce yourself to the Members and staff present before the hearing begins and make any small talk that seems appropriate.

Speak the language of a layperson. Don't use scientific or professional jargon that will not be understood. When it comes to credentials, Members are seldom impressed. Do not use your time and the first page of your statement to let everyone know how important and qualified you are. This is assumed, and will be verified if you can say why you are before the committee and what action should be taken on behalf of those you represent and those the committee Members represent.

Remember the basics. Speak loudly enough; don't mumble. With the extraneous noise in the room, it is difficult for some Members to hear.

Create a feeling of trust and confidence between yourself and the Members. Members are politicians and are familiar with taking the word of a person they trust. They frequently judge a program or a cause by their perceptions of the person making the case. This feeling of trust can be created by the informal contacts, the demonstration of sensitivity to the problems of people, the willingness to engage in dialogue, and the virtuoso performance.

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Oral testimony should, in most cases, be limited to five to ten minutes. It should only hit the highlights. Reading a long, dry statement is not a good idea. Limiting your presentation leaves time for questions and dialogue. Lengthy written material to cover specifics should be inserted in the record to make your backup data available to the committee. Further, the bulk is useful when a Member argues the same issue later.

A good witness is a good merchandiser. S/he knows the subject (product) and knows the committee and Members (customers). Homework should be extensive. Members' special concerns must be known. This allows the testimony to be focused and to include effective information about "back home" in the Member's state or district.

The hearing is like a performance. The more entertaining, interesting, or different you make your presentation, the more likely Members will respond positively to you. Saying things like, "You owe us this," or "Congress shouldn't promise more than it can deliver," may be right, but you will get nine out of ten Members' backs against the wall. You are attacking the institution.

Remember that the best testimony appears extemporaneous. Politicians are impressed by the lone individual giving a virtuoso performance. They feel that their effectiveness as legislators is judged in large part by their sure grasp of the facts and their ability to react quickly to the flow of events in a hearing, mark-up, floor debate, or conference committee. Thus they are likely to be favorably impressed by witnesses who meet the standard by which they feel they are judged.

Provide for the committee your best professional judgment on what should be done — what action they should take. It's the best thing you have going for you, and the most honest. In conducting a dialogue during the hearing, try to strike a balance between being forceful, articulate, and witty. Arrogance or condescension invites trouble.

It does not hurt to say "I don't know" (as long as you don't say it too often). Admitting you don't know can be a mark of honesty. Move on to talk about something you do know about. A response of "I don't know" can be followed by an offer to submit an answer or the data requested later for the record. Such offers should be faithfully honored, preferably within a couple of weeks.

Don't be concerned if a staff member sits in on any meeting. In the long run it will be a plus for you. If a Member doesn't know all the details about a specific area, chances are s/he will have a responsible staff person do the follow-up work. Keep in mind that it is the staff who prepare questions and write background papers on the issues.

If the hearing is being televised you will usually find many Members present at the beginning to take advantage of the media exposure, particularly if it is a major hearing on a very important subject. However, television cameras seldom stay all day and neither do Members.

In Congress, as in most public bodies, a verbatim transcript is made. If the chair says, "We're very busy, would you summarize your statement and at this point it will be included in the record," it will be included just as though you had read it.

A hearing is only one part of the work of a legislative body. Other business takes place and, therefore, any hearing may be interrupted at any time for a variety of reasons. You might be in the middle of a statement which took you two weeks to prepare, only to hear the chair say, "The bells have rung and the Members have been called to the floor for a vote." You may find this frustrating since you have so little time to testify. If Members leave for a vote, it will take at least fifteen to thirty minutes before they return. This, of course, will shorten your time to testify. Also you will find that with each roll call vote, the number of Members returning to the hearing has decreased. This is not necessarily a reflection on you or your subject. Sometimes Members are scheduled to be in more than one hearing at the same time, and they want to appear in as many places as possible.

There are times when you will appear before a committee only to find one Member present. When this happens, look around and see the number of staff. Many will be there representing their Members. They are listening to every word and taking notes. They are important because they report back to the Members. When the final vote is taken, every Member, whether or not s/he attended the hearings, has a vote.

Committees operate under a number of parliamentary rules such as the five-minute rule. If a subcommittee has fifteen members, rarely will all fifteen show up for a hearing. If a significant number do, the chair would probably invoke what is called the "five-minute rule." Under the five-minute rule, each Member, beginning on the majority side, has five minutes to make a statement or develop a line of questions. After five minutes (and it could be less, depending on the prerogative of the chair), the first Member on the minority side gets to question. Sometimes other Members will pick up the original line of questioning but more likely each Member will have his or her own line. Because of this continuous shifting, a particular line of thought may become very difficult to follow.

Suppose you have spent two weeks preparing testimony, you are ready to make a great impact on the committee with a magnificent document which will go down in the annals of legislative history, and you don't get to read it. Suppose you only get five minutes to

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summarize your statement. You can expect to be frustrated. But then, view yourself as the fifth witness on the tenth day of hearings on the same subject. If you put yourself in the role of a Member who has sat through all ten sessions, you will understand the boredom and drop-off rate.

As a witness you may choose to ignore the chair's request to limit your statement. Although you may be on stage, in most cases you will have lost your point. Be as concise as possible. Remember, Members want to get on with it.

You will find at times that although you are the best witness on a particular subject, and you should be accorded the spotlight and testify by yourself, you may be testifying with several others at the same time. Whether you are alone or with others depends upon the committee and the amount of time it has scheduled to hear about the particular subject. If you are one of three or four witnesses scheduled for that day, you will probably appear alone. Some committees, however, schedule fifty or sixty witnesses a day under the theory that everybody should have an opportunity to be heard. When this happens, witnesses will usually be grouped in panels. If so, other panel members may or may not hold positions compatible with yours.

Issues are often very clear, but Members like to see the arguments pit one against the other. A dialogue between witnesses gives them an opportunity to hear all the arguments from the experts. It is also a good way of hearing from a number of people saying the same thing, in different ways. It is all part of the education of a committee as it prepares to deliberate on a particular matter.

Generally a public hearing will be a very courteous exchange unless the person speaking is at odds with the committee. Often when a witness testifies and a Member doesn't like what s/he hears, no questions will be asked. However, depending upon the mood of the day, tough questions may be asked. Therefore, be prepared for anything.

Public officials may digress from the subject at hand depending upon circumstances at work that day. You may have just presented what you consider to be brilliant testimony, only to find that the questions have nothing to do with your particular statement. A Member might simply ask questions because of who you are or who you represent and get into a line of discussion unrelated to your testimony. Always assume that no matter how well you brief yourself and work with staff and others, you will hear at least one "off-the-wall" question at any hearing on any given day.

If you're in the audience during a hearing, and you feel compelled to say something or ask a question, the best advice is ...don't. Chances are you will not be allowed to and you can actually have a negative

effect on the entire procedure. Instead try to get to a Member or staff person after the hearing and make your point at that time.

Always try to answer the committee's questions in the first sentence of your response. If you want to supplement and qualify your response, do it after the initial answer. Any witness who leaves a hearing without being questioned should not feel relieved, because actually a significant opportunity to effectively educate the Members has been lost.

Regardless of political party, or whether Members are conservatives or liberals, they extend great courtesy to one another. Only rarely does the chair admonish or cut off a Member publicly. Normally if the Member insists on more time than usual, s/he will get it. Even though Members may be 180 degrees apart on philosophy, they may be the best of friends.

Don't argue with Members. They will always have the last word. If you disagree, say so, state your case, and leave it at that. If you think of an additional rebuttal after the hearing (known as the "I wish I'd thought of that" syndrome), write the appropriate Member a note and see that other interested parties receive a copy.

If you feel a Member does not understand a subject or that you have been attacked unjustly, accept the challenge, but do it carefully and with deference. Remember, you may testify again on different subjects and possibly for opposing positions; so do not be too rigid or dogmatic. It may come back to haunt you!

Courtesy dictates that you avoid interrupting a Member when s/he is asking a question or making a statement. If a Member's time for questioning expires before you can respond, ask the chair for a minute or two to respond. Don't use a hearing to spring a surprise upon a committee or unsuspecting public unless you have given the chair and other ranking minority Members advance notice. Humor, not canned jokes, can be effective in hearings if it is spontaneous. It does, however, take some sensitivity to the styles of different Members.

Members are put off by witnesses who appear to be meddling in their business — politics. They believe they are the experts in politics. They appreciate testimony which demonstrates sensitivity to political problems without explicitly telling them how to do their job, which is making political judgments about questions of public policy.

Often a witness will notice Members talking among themselves and appearing not to be listening to you. This is normal. Business takes place during a hearing which may or may not relate to the subject being discussed. At the same time, you may also see Members talking to staff. This probably does relate to the subject of the hearing. Staff may be suggesting questions to be asked. Don't consider this rude; it is part of a normal hearing. If you become indignant, it's going to be a rough day for you. Several years ago at a hearing, a witness complained

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about the talking. The witness said, "I came here at my own expense. I want to be heard. I want you all to pay attention." Everything stopped. The witness finished her prepared statement; the chair thanked her and excused her. Needless to say, she was not questioned. That was the last time she ever appeared before that committee.

Finally, courtesy requires you to win and lose graciously. Allow the other person to save face if s/he's a loser. Don't corner your opponent. There's always tomorrow and there's always another issue. Leave the door open; your opposition today may be an ally tomorrow.

Too often the work elected officials do is taken for granted. They usually hear from people only when they want something or when they are angry. If an elected official does something for you, extend your thanks. It will not go unnoticed.

12. Words to the Wise

When working to affect public policy it's always good to remind yourself that as in baseball games, "You win a few; you lose a few; and a few are rained out." Sometimes a bill will pass or fail regardless of what you said or didn't say. The process may be "wired." You may help to wire it. "Wiring" does not just happen. You have to put the proper wires together just like an electrician. If you mess up, you will get a short circuit and may be electrocuted. Thus, it is essential that you do sufficient homework to understand all the key issues. Keep in mind, however, that even "wired" bills seldom gain unanimous support unless the substance is sound.

Some think of lobbying and say, "We've got a problem; let's go see our elected official." Many who lobby only come around when they want something. As a result, when they enter the room an antenna goes up and a legislator thinks, "Okay, I'm going to be hustled today." Elected officials and their staffs are very busy. If the only time you see them is when you are pressuring them to do something for you, it will rapidly wear thin. The result is that you will eventually lose access to that individual. Don't abuse privileges or contacts.

Don't be hostile if a Member doesn't vote with you this time; indicate that you regret you couldn't get agreement on this particular issue, but you look forward to working with him or her in the future. If Members don't run into hostility on a given vote, they are more likely to listen carefully when you come back for something else. Elected officials and their staffs are human. They respond to little niceties.

Don't be so rigid in your position that you refuse to compromise. To get something is more advantageous than to get nothing. Often you will have to settle for less than you wanted. If you can't compromise, chances are you can be defeated by a minority of interests who want to

stop you from getting anything. Also, always have a fall-back position.

Most legislatures are bicameral, meaning that they have two houses. Never assume that what happens in one legislative body is known to the other, and do not attempt to play the policies or members of one house against the other. Each body is constitutionally separate and does not want to acknowledge the existence of the other. Follow relevant events in both houses and implement your strategies appropriately in each one.

One thing which disabled advocates in particular should remember is to vary their approach. Do not use the same people time after time to make your case. Visual impact can be very effective, particularly when a disabled person testifies. This often has "shock" value. One note of caution though is, don't overuse the shock approach because it will lose effectiveness. Also make your most effective and poised speaker your spokesperson.

Finally, keep trying. You may not win. It would be very easy in losing the first time to throw up your hands and say, "The system stinks." Remember, you may have failed due to factors over which you had no control. However, you are building for the future. If you make a good showing and make some good contacts, you will lay the groundwork for years to come. If you have made a contact with a Member or with the staff, even though you lost, keep the contact up. Keep the communications open. Build a rapport. The process of educating policy makers is ongoing. Once you get them involved and interested, they may respond in the future.

View From the Grass Roots

1. Introduction

The character of American society is molded by the structured interaction of more than 200 million individuals. All fundamental aspects of daily living, from meeting basic needs to defining acceptable social behavior, must be decided among citizens with vastly different beliefs and principles. The vehicle to determine policies and maintain the orderly operation of our society is, of course, government. Subdivided into numerous jurisdictions (i.e., local, state, and federal) government continuously monitors the status of the nation and develops or revises policies in response to perceived needs.

Recognizing the broad purpose of government and its dominant role in influencing social conduct, it is clear that concerned individuals must work effectively within the established political process to influence decisions on policies which they consider important. Government may not resolve an issue to the complete satisfaction of all individuals; yet, it does provide a forum to potentially affect public policy. In contrast, an individual who chooses not to work within the "system" will have little opportunity to successfully influence policy. A traveller, for example, who refuses to use modern transportation will confront substantial hardship if s/he insists on walking from Los Angeles to New York instead of driving. Actually, challenging the political process can be less effective than simply ignoring it. Such action could be compared to driving the wrong way on a one-way street to protest traffic laws. The protest is likely to adversely affect the protester but is extremely unlikely to change the traffic laws.

Frequently, individuals with strong opinions on certain issues, who are willing to work within the system to address them, do not participate in government decision-making procedures because they are intimidated by the scope and complexity of government. Naturally, an individual's effectiveness in the political process will be enhanced by experience and refined lobbying skills; yet, most successful attempts to influence policy decisions rely on "average" individuals who dedicate their time and energy to the long and often tedious process of developing issues and executing strategies in a planned and disciplined manner. Despite popular conceptions, "lobbying" a particular government body does not depend on subtle internal maneuvering or brilliant strategies. On the contrary, influencing a political decision involves persistence and a commitment to hard work. In essence, many of the apparently intimidating aspects of the political process are substantially more myth than fact.

In a similar manner, too many individuals opt out of the political process because they don't recognize their value to a lobbying movement. They are victims of a popular misconception. That is, when

confronted with the question—"How can one individual make a difference in such a large process?"—they tend to significantly underestimate their importance. Essentially, any lobbying effort is performed solely by individuals. One individual works with a second individual, who works with a third, and so on, until they create a coordinated effort to achieve a policy objective. Specific functions are designated for each person. Although the functions of some individuals may be in the center of public attention while the action of others is unnoticed, it cannot be assumed that one individual's participation is more important than the work of others. For instance, a witness who provides the key testimony at a hearing on a particular issue is likely to receive a fair amount of public attention. Yet, that witness could not have testified without the work of many other individuals.

Thus, the process of influencing public policy requires the participation of many individuals. For all practical purposes, average citizens who join an effort to influence government decisions become lobbyists. Their activity may include writing to legislators, providing testimony, or coordinating the efforts of a lobbying team. Regardless of the complexity or simplicity of any individual's function, s/he can offer a valuable contribution to a lobbying effort. In the following sections of this paper we will discuss the structure of government and how issues are developed within that structure. Included in the discussion will be the roles of all individuals, both laypersons and skilled lobbyists, in successful efforts to influence public policy.

2. The Structure Of Government

As discussed in *The View from the Hill*, everyone has been exposed to the basic process of decision making. Nonetheless, understanding the basic approach to influencing a decision is, in itself, insufficient to influence a government policy decision.

In sports, for example, though athletic ability is important to an individual's performance, it does not, in itself, enable one to influence the event's outcome. In a football game, try to imagine a quarterback who can throw a football with outstanding ability, but who does not know the rules of the game. To be a successful participant, the player must understand how to influence the game's score by scoring points under the rules of that game.

Similar to the athlete who must know the basic rules of the game to help the team win, a lobbyist must know how to participate successfully in *government* decision-making. The responsibility of government is immense. Therefore, government authority is distributed throughout numerous components that have jurisdiction over certain functions or geographic areas. Each component is likely to have a

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unique character and decision-making process. Thus, the decisions of each government body will be influenced in a different manner, just as points are scored differently in soccer and football. Attaining a desired policy objective will often depend on how well a lobbyist understands the structure of government and the nature of the particular government body which s/he is attempting to influence.

The most common division of authority is the separation of the administrative from the legislative branch of government. The legislative branch establishes the law, and the administrative branch implements the intent of the law. On a particular issue, the legislative branch plays a very visible role in making important decisions. Yet, the statute (law) enacted by the legislative body frequently requires the administrative branch to develop specific instructions (regulations) on how to interpret the law. Thus, administrators can be flexible in determining policies which reflect the intent of the law.

At times, individuals restrict their concept of lobbying to actions that only influence the legislative process rather than the decisions of the administrative branch. Such a self-imposed limit on the scope of lobbying can defeat an attempt to influence public policy. In essence, two factors must be acknowledged. On the one hand, the administrative branch cannot implement a policy or program unless the legislative branch authorizes it and appropriates the funds to carry it out. On the other hand, the legislative branch can establish policies and appropriate funds; but, it is the administrative branch which actually uses them to implement a designated policy.

The struggle to implement Section 504 of the Rehabilitation Act of 1973 illustrates the function of the administrative branch and the need to influence the action of both the administrative and legislative branches. In 1973, Congress passed a law which, among other provisions, established a federal policy prohibiting discrimination on the basis of disability. The law, however, had little effect on the average citizen until 1977 when the administrative branch of the federal government finally published regulations which specified how the intent of Congress was to be carried out. Even today, the administrative branch has not completed the regulations to implement this 1973 law. To be sure, much can be said about the Rehabilitation Act; yet, the point of this example is that the success of a lobbying effort must be measured by the actual impact on consumers. In most cases, influencing the passage of a law cannot be considered a success unless the action of the administrative branch is also influenced.

In addition to the distinction between administrative and legislative components of government, authority is commonly distributed among three basic levels of government: local, state, and federal. Public policies are often implemented through joint efforts of all three levels.

Accordingly, to influence policy, it may be necessary to monitor and influence the decisions made at each level. For example, attaining an integrated system of easily accessible public transportation for handicapped and nonhandicapped individuals is currently a major issue. Federal action is extremely significant because it offers a means to assure consistent transit policies throughout the nation. Nonetheless, it would be foolish to overlook the potential for state or local government to either positively or negatively affect the availability of transportation services.

After gaining an initial understanding of the various government components and of their structured interactions, a lobbyist should recognize each component as a separate entity with its own interest and character that determine how it can be influenced. Decisions in government are made by people; and effectively influencing policy decisions implies the ability to successfully influence the people making the decisions. The decision makers however, are not as free to develop their opinions as it might seem. On the contrary, they are substantially influenced by the procedures under which they function. Likewise, a lobbyist's ability to gain access to the decision makers and to offer meaningful information depends on his or her knowledge of the procedures within a particular government body.

The following illustrations should make this principle clear. As the size and complexity of government increase, the procedures for making decisions and influencing the decision makers change. A small-town mayor can personally attend to the needs of the city and of the constituents who elected him or her. The Mayor of New York City, understandably, does not have the same flexibility in time or in political commitments to work that way. Whereas a small-town mayor may be most effectively influenced by a personal discussion, the large-city mayor is likely to delegate responsibility to a staff member who may expect the issue to be presented in writing and perhaps, in a specific format. A lobbyist who does not understand this may discover that an excellent written position on an issue is useless in influencing a decision in a small town, and that pursuing a personal meeting with a large city's mayor is hopeless.

In another example, the United States Senate has 100 Members who represent fifty jurisdictions, the states. Some states are comparatively small, yet, as a whole, the Senate must be responsive to the entire nation. Even if a Senator from a small state could maintain close contact with constituents, s/he is committed to observe the procedures of an institution designed to suit the entire federal government. To assure the orderly performance of business, the Senate follows precise rules in decision making. Occasionally, a lobbyist can influence a decision by expressing a position to readily accessible Members of the

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Senate or their staff. However, if a lobbyist understands and follows the procedures and presents a position to the Members who have major roles in deciding policy in the specific area of interest, then, the effort is more likely to be productive.

Understanding the "character" of a particular government body is more abstract than knowing the technical relationships of that body to other government components or the internal procedures for formulating policies; nonetheless, it is an important aspect of lobbying. Broadly, the character of a government body can be considered in terms of its sensitivities and common mode of operation. The general character of a state legislature, for example, is molded by such factors as how its members are selected and the functions they must perform. That is, the members of the legislature are elected by the voters of a district, and they are assigned to promote the general welfare of their state as well as that of their own constituents. As elected officials, they can be expected to be sensitive to their constituents' opinions and, as members of a legislative body with a broad purpose, they will usually discuss issues in general terms that are recognized by laypersons. In contrast, a local commission with a specific purpose and appointed members may have a very different character. Surely, an appointed official is likely to be sensitive to a different kind of political pressure than an elected official. Also, a government body with a specific function (i.e., a transit district board of directors) is likely to discuss issues in detail and with a degree of technical knowledge that laypersons may not possess. By evaluating the character of a particular government body, a lobbyist can gain meaningful insight into how information should be presented (i.e., in the language of a technician or in more common terms) and on the general nature of the members who will be making decisions.

In summary, the overall structure of government, the internal procedures of specific government bodies and the character of each body play significant roles in government operation. More important, these aspects affect the ability of lobbyists to influence decisions. For this reason, a lobbyist must adopt a broad view of the decision-making process. Due to overlapping jurisdictions, a single body may not have the authority to act on an issue in the manner desired by the lobbyist. In such cases, the decisions of other government components must be influenced, or their decisions must be assimilated into the position the lobbyist is presenting. Likewise, the position of the lobbyist should be presented through the appropriate procedure in a particular government body and in a manner that is technically and politically compatible with the character of that body. Thus, lobbying is as much a matter of accommodating institutions as it is of accommodating individuals. A

lobbyist's effectiveness substantially depends on his or her recognition of this fact.

3. How Issues Are Developed in the Political Process

Sooner or later, everyone participates in resolving a problem. In most day-to-day activities we confront simple concerns such as establishing a policy on selecting which television program to watch, as discussed earlier. A number of fundamental steps are usually followed to resolve such conflicts. First, the primary concern is identified. The next steps include identifying the source of the problem and possible solutions. Finally, a policy is established to resolve the problem, and a method of implementing the decision is developed.

Since the process of resolving an issue is so integrated into the performance of daily activities, most people are unaware of their involvement in a structured process. Many may not even realize an "issue" exists; yet it does. For example, a hungry person is confronted with a problem. It could be defined as the need to satisfy hunger. Several options that could resolve the problem exist. The most practical option may be to eat something; but other options include taking some nonfood item to suppress the hunger, or simply tolerating it. Selection of the best option may be influenced by a number of factors, such as the funds available to the person to buy food, or the person's desire to meet other objectives like losing two pounds by the end of the week. After considering the options and selecting the best one, the person must then implement the decision. If the decision was to eat something, the individual might get his or her money and go to a restaurant. If the decision was not to eat, the person might resolve the issue by watching television as a distraction from the hunger.

As you can see, when individuals are confronted by issues they commonly resolve them through a structured procedure. Conceptually, government resolves an issue in a similar manner. For instance, consider the hungry individual as if s/he were a government entity. The issue is the same: "How will the hunger be satisfied?" After reviewing the options, assume that a decision was made to eat something. In this case, the legislative branch of the government would have determined the basic policy. In turn, the administrative branch will use the appropriated funds to buy the needed food at a restaurant. Consistent with the intent of the legislative branch, the administrators would prescribe guidelines on the type of restaurant to be used and which menu items are acceptable.

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The Developmental Stages

Surely government decisions cannot be considered as easily as decisions affecting a single individual. Decisions and decision-making procedures become more complex as more individuals and interest groups become involved. Nonetheless, the development of an issue from recognition through resolution tends to follow a common pattern which can be separated into a series of identifiable stages.

Each stage of development is intended to accomplish a certain purpose which will ultimately lead to an effective resolution of the issue. Thus, certain aspects of the final resolution will be determined at each step. Individuals or organizations with an interest in the issue can increase their abilities to influence decisions by recognizing the current stage of development and, accordingly, by addressing the specific purpose of that stage.

This principle can be illustrated by considering the developmental stages of a child. An infant must first learn such survival skills as eating and walking. In a very unscientific characterization of child development, other stages can be suggested, such as the general development of the child's personality, the development of pre-vocational skills, and the attainment of specific vocational abilities. A father who wants his son to grow up to be a doctor could enhance that possibility by influencing each stage of development. During the early years, he may stress the development of thoughtfulness and patience in the child. The intermediate stages might focus on encouraging the child to develop basic math and reading skills as well as humanistic attitudes toward society. In the final stage, he can address his desire more directly by enrolling his son in medical school. In essence, the parent's objective should be responsive to each stage of the child's development by exerting influence in a manner tailored to the purpose of each stage.

If a particular stage of development is neglected, the entire process may be affected. Certainly, a parent who hopes his child will become a Marine should not overlook the early stages of development and wait until his son is old enough to enlist in the armed services to begin exerting influence. Although the final stage of development offers the opportunity to be direct about attaining a specific objective, the desired option may not be possible due to earlier, more general, developments. In this case, the son may not have been encouraged to gain the necessary physical attributes required of Marines. Likewise, when his personality was developing, the child may have been influenced by a philosophical orientation that is incompatible with the lifestyle of a Marine. By focusing on the ultimate objective rather than on each stage of development, the father's attempt to influence his son may be ineffective.

The political significance of recognizing the stages of development in a particular issue can be demonstrated by comparing the two previous examples. Consider a situation wherein one parent wants the child to become a doctor, and the other parent would prefer that the child become a Marine. Both parents must give special attention to each stage of the child's development. Clearly, the parent who plays the most effective role in developing the character of the child will have a distinct advantage when the child is ready to select a career. In fact, a parent who does not *appear* to have substantial authority in deciding family affairs can significantly shift the balance of power by carefully developing the issue in the early stages.

Grooming the character of an issue and negotiating for an advantage in the balance of power are important tasks for a lobbyist. Issues are not commonly separated from the overall process of government nor are they presented in clearly designated stages. Government is an ongoing process that continuously develops new policies and revises old ones; thus, it is seldom clear when issues begin or end. Nonetheless, there are identifiable distinctions between the developmental stages of political issues where subjects are clearly undergoing transitions from general discussion to specific policies intended to resolve the issues. The ability to distinguish these stages and to respond in a manner that will enhance planned efforts to influence decisions is a "tool" lobbyists use to increase their effectiveness.

The actual stages of development for a certain issue will be determined by the character of the government body that is addressing the subject and by the complexity of the particular issue. No common sequence of stages can be expected because of the diversity of government and the political manipulation of issues that takes place. Still an individual can define certain general aspects that will usually be encountered in an issue's development, and these can be conceptually isolated into different stages. In the actual operation of government, these stages will usually be blended together as an issue is resolved. Accordingly, a specific sequence of stages is not being suggested. The intent of the discussion is simply to illustrate events that mold aspects of final policies designed to resolve issues. Since the public generally becomes aware of an issue after it has been substantially developed, many individuals tend to limit their concept of lobbying to influencing the passage of the final policy or law. By expanding the concept of lobbying from attention to a single act to attention to the entire evolution of an issue, the discussion shows how a lobbyist can groom an issue toward the desired policy objective.

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Identify the Issue

The function of government requires the direct and concise definition of an issue. Naturally, when a group of individuals cooperates to resolve a common concern, they must, at the very least, have a mutual understanding of the subject. Because most governmental bodies are composed of members with different perceptions of the issue, and different attitudes that will influence their desired resolutions of the issue, it is obvious that any issue must be presented in unambiguous terms that will isolate the primary concern from other issues related to it. The vast number of issues to be addressed and the corresponding amount of time which can be allowed for discussion on each subject create an environment where constructive debate simply cannot occur unless the issue is well defined.

The political nature of government emphasizes the necessity for proper identification of an issue. Even where no adversary roles exist, confusion about the definition of a subject can disrupt or destroy the exchange of information among decision makers. However, adversary roles generally do exist in most government policy debates. Politicians who oppose a policy that cannot be defeated on the basis of merit may be satisfied to defeat it by confusing the issue. Anyone who has watched a committee hearing in Congress knows that many close decisions are determined by the momentum which favors one side or the other. If one side can shift the momentum in their favor, they can win. Thus, a committee Member whose issue appears to lack momentum can slow down the discussion by expressing confusion about the focus of the debate and by encouraging the committee to regress and clarify the subject being negotiated. A more sophisticated Member who opposes a policy may try to defeat it by introducing some related concepts which are politically highly sensitive. In either case, proper definition of the issue will reduce the chances of such disruptions.

The terms used to define an issue can serve political as well as a technical functions. The label placed on an issue may have a technical interpretation which accurately defines the subject, and a political interpretation that will link the issue with certain attitudes. Sometimes, the political bias which is added to the identification of an issue has little technical meaning. For example, a term like "the armed forces" may be stated as "the American armed forces" even when it is clear whose forces are being discussed. Generally speaking, this sort of rhetoric will not be meaningful as an issue moves into the later stages of development; but, it may be useful earlier when the main goal is to give the issue visibility and emotional appeal rather than technical clarification.

In other cases, terms that identify an issue may have technical implications that will significantly influence the issue's development. Most issues can be categorized in several ways. Construction of a new dam, for instance, could be categorized as an energy, water-supply, or parks-and-recreation issue. Clearly, each category has significant political connotations. As an energy issue, the decision to construct the dam may be opposed by interest groups who support other means of producing power (such as the use of coal). On the other hand, emphasizing the dam as a means of increasing water supplies might not avoid the involvement of those who oppose hydroelectric power, but it could focus the issue away from their concern. In addition, it could elicit the support of farmers and urban dwellers who need water for either business or personal reasons.

A definition that tends to categorize a subject into a particular area of concern will also be significant in other ways. Most legislative bodies establish committees with specific jurisdictions. An issue's committee assignment has an overwhelming impact on its development. The time available to consider the issue, and the number of other issues assigned to the committee which are competing for attention, have important effects. From another perspective, the character of the committee will influence the general nature of any proposal passed through it. Because different committees are likely to formulate significantly different solutions to the same problem, the initial categorization of an issue is crucial.

To illustrate: Consider the division of authority in the United States House of Representatives. The Social Security Act establishes various programs to enhance the nation's general welfare. To focus on programs authorized by the Social Security Act, and to integrate their policies with those authorized through other acts of Congress, specific subcommittees have been given jurisdiction over different segments of the act. Title XIX of the Social Security Act (Medicaid — a major health program) and Title XX of the Act (grants to states to facilitate the delivery of social services) are assigned to different subcommittees. An issue assigned to the subcommittee with jurisdiction over Medicaid is destined to be decided by Representatives who commonly address traditional health service-delivery methods. On the other hand, the subcommittee that oversees Title XX programs may be accustomed to developing the more flexible service-delivery methods associated with social services. An issue which can legitimately be categorized as either a traditional health-related matter or as a social-service matter will be substantially influenced by its assignment to one or the other of these subcommittees.

Potentially, "attendant care" is such an issue. For purposes of this discussion, attendant-care services will be considered as supportive

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services needed to enable an aged or disabled individual to live independently in a safe, comfortable manner. The issue of developing a strong national policy on attendant care can be resolved by following the social service model or by following the more traditional health model. (Of course, the issue can be resolved in other ways as well.) Currently, some states provide attendant-care services through the Medicaid program, some states provide them through Title XX programs, some states use non-federal resources, and others simply do not provide such services. Thus legislation in the House of Representatives which addresses attendant care could reasonably be assigned to either the subcommittee with jurisdiction over Title XX issues or the subcommittee with jurisdiction over Medicaid.

Assuming that the House acts on this issue, the final policy will undoubtedly reflect the character of the subcommittee that develops the proposal. The provisions of the Medicaid program or the Title XX program cannot be used to predict exactly how a subcommittee will respond to the development of the attendant-care issue; but, common policies in these programs do suggest how the different subcommittees may lean toward certain general procedures. Since incorporating stronger guidelines on attendant care into one of these existing programs (i.e., Medicaid or Title XX) may prove to be the vehicle used to achieve a new policy in attendant-care services, current distinctions between Medicaid and Title XX and the particular subcommittee assignment may substantially affect this issue's development.

Provisions that are sure to be addressed in the development of the attendant-care issue are those that determine the skills required of persons employed as attendants, and the circumstances under which a relative can be paid for providing services. In general, the Medicaid program requires significantly more training for an attendant than does Title XX. Likewise, payment to relatives is not allowed under Medicaid; but it is under the social-service model of Title XX. To the degree that the differing Medicaid and Title XX policies reflect differing attitudes of the subcommittees with jurisdiction on these subjects, the categorization of the issue, when it is initially identified, will influence the final policy.

In sum, the first stage of development — issue identification — serves the following specific purposes. On the surface, it clearly identifies the subject. More significantly, it determines which aspects of the issue will be highlighted in debates, which special interest groups are likely to become involved in the issue, and which members of government will formulate a policy to resolve it. Thus, the goal of a lobbyist is not only to give the issue common recognition; but to influence the general perception of it. Consequently, the issue is already

decided in these general ways as it moves into the middle stages of development.

Determine a Policy

Issues can be resolved in many different ways, though not all persons or organizations who believe government should address a particular issue will agree on the best way. The political system allows concerned parties to express their opinions. Through a process of hearings, debates, and other exchanges of information, members of government seek clarification, argue for or against certain proposed policies, and ultimately establish proposed resolutions.

Most people are familiar with the actions that characterize this discussion stage. Essentially, a designated government body reviews the issue and decides whether a new or revised policy is needed. It then determines the objectives of the policy and the means of achieving it. To influence such decisions, a lobbyist can actively promote the technical merits of a desired policy more directly than s/he did during the earlier stage of issue development.

When the political process is opened to the public for it to recommend a response to the issue, the members of government expect the public to voice its opinions. This is when facts are collected, concerns are expressed, and ideas are matured into specific policies. Members of government and their staffs may be reluctant to discuss an issue in detail before this stage; and they are likely to resist attempts to introduce new ideas into the resolution of an issue beyond this stage. This is necessary to allow a government body to properly attend to the issues under its jurisdiction. A member may also feel that comments should be presented at the appropriate times and that those who do not participate should pay more attention to the structure of the decision-making process. Accordingly, a position with substantial merit which is not presented during the comment period may be ignored.

When a government body addresses an issue, the decisions that resolve the concern are usually made through a specific sequence of steps. This will be illustrated using the California Legislature as an example. It is divided into two houses, the Assembly and the Senate. First, a proposal must be introduced on the floor of either house. Technically speaking the introduction of a bill serves to advise the public that the legislature is formally addressing the issue. A bill will be labeled to reflect the house in which it was introduced, so let us consider a bill identified as Assembly Bill 1, or AB 1. After being introduced, AB 1 will be assigned to a committee that will review its "policy" aspects. The policy committee may accept, revise, or simply reject the proposal. If or when AB 1 is passed out of the policy committee, it will proceed to the fiscal committee for consideration.

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Again, AB 1 may be accepted, revised, or rejected, this time because of its financial implications. A bill that has been passed through the policy committee and then through the fiscal committee will be scheduled for a vote by the full Assembly.

If AB 1 is passed by the Assembly, it must then follow a similar procedure in the Senate. The bill must pass through the first committee on the basis of acceptable policy and, then, through a second committee on the basis of its fiscal merit. Ultimately, the bill must be voted on by the full Senate. Any amendments to AB 1 from the Senate must be accepted by a vote of the full Assembly. When both houses agree on identical policy, the bill is reported out of the Legislature and goes to the administrative branch where the Governor can accept (sign) the bill or veto it. Note that s/he cannot revise the language of the bill.

As AB 1 moved through the committee process, it was evaluated to determine certain aspects of a final policy. In the actual operation of government, the distinction between policy and fiscal evaluation is not always as clearly defined as it is in the committee structure. A committee may act in a manner that suits the wishes of the committee members rather than the formal rules of the Legislature. Nonetheless, the lobbyist must acknowledge the designated function of each committee.

Unlike the process in the California Legislature, the United States Congress does not assign legislation to different committees to perform limited functions. Rather, all elements of a policy are determined, in most cases, by a single committee. For instance, Supplemental Security Income (SSI), a cash-assistance program for the nation's aged, blind, and disabled persons, falls under the jurisdiction of the Committee on Ways and Means in the House of Representatives, and the Committee on Finance in the Senate. In their respective Houses each committee considers all elements of the SSI program. (A bill which proposes revising SSI policy will pass through these Committees and then to a floor vote. Although the Budget Committee does not act on such a bill, Congress acknowledges the role of that Committee in establishing broad fiscal policy. Thus, the Budget Committee may influence the fiscal aspects of a policy even though it does not draft legislation or, as a separate body, vote on a proposal.)

Although a committee may be solely responsible for policy decisions on a particular issue, such authority may be divided into subcommittee jurisdictions. The recently enacted Social Security Disability Amendments of 1980 (PL 96-265) illustrate the significance of this. In general, the Amendments authorized changes in the disability-related programs of the Social Security Act. Some provisions of the legislation addressed the Disability Insurance program (DI), and others focused on the Supplemental Security Income program (SSI). (The Amendments

also addressed other programs which need not be discussed here.) Both DI and SSI are under the jurisdiction of the House Committee on Ways and Means. However, the DI program and the SSI program are assigned to different *subcommittees* of that Committee. Thus, the DI legislation evolved as two separate bills: H.R. 3236 and H.R. 3464, respectively. Although the bills addressed some common principles, lobbyists who wished to influence the issues had to address both subcommittees. Certainly, the full Committee on Ways and Means played a role in defining policy, just as the full membership of the House considered the legislation through limited debate on the House floor. Yet, the overwhelming majority of policy decisions occurred in the two subcommittees.

By contrast, the Senate developed the issues primarily at the committee level. Both DI and SSI are assigned to the Senate Committee on Finance. Unlike the Ways and Means Committee in the House, the Finance Committee does not make decisions at the subcommittee level. Certainly, subcommittees play an important role in obtaining information and drafting policies. Also, during debate in the full Committee, Members will look to those persons from the subcommittee whom they feel understand the issue. However, a proposed policy is not voted on by a subcommittee. By consolidating that function into the role of the full Committee, and through other means, the Finance Committee has established the full Committee as the primary decision-making body.

The sequential determination of policy and, more important, an awareness of the priority level in this process, affects the ways policies can be influenced. In the House of Representatives, the divided subcommittee jurisdiction over DI and SSI means the overall issue must be addressed in two distinct ways. The variations reflect technical differences in the issues (DI versus SSI), the character and attitudes of the Members of one subcommittee as opposed to those of the other, and the specific proposal before each subcommittee (H.R. 3236 versus H.R. 3464). A lobbyist must respond to these variations when s/he addresses an issue common to the policy being decided in the two subcommittees. Furthermore, s/he must acknowledge that policy determinations are dominated by decisions at the subcommittee level. Although policy consideration will continue as the proposal moves through the full Committee to the House floor, inattention to subcommittee actions will severely limit a lobbyist's effectiveness.

In the Senate, a lobbyist must concentrate on the actions of the full Committee to successfully influence major decisions on DI and SSI. Because the Finance Committee deemphasizes subcommittee action, the lobbyist must present a position in a manner that will influence the full Committee. A lobbyist should also attempt to influence the

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subcommittee's attitude on a policy; but, the major decisions on policy will be made when the full Committee acts on the issue.

In grass-roots lobbying, it is vital to understand which events in the determination of a policy are the most important. Characteristically, a grass-roots movement has limited resources with which to accomplish its objective(s). Accordingly, its abilities to attend scheduled hearings, or to be present when legislative staff are preparing background information on certain issues, are limited. For this reason, such a movement may be more prepared to focus its participation on one or two key events, rather than on engaging in a series of events. The way certain provisions of the Social Security Disability Amendments of 1980 were determined in the House and the Senate demonstrates how a priority can be assigned to a particular step in the decision-making process. The steps which warranted priority consideration were, obviously, subcommittee-level actions in the House, and full Committee-level actions in the Senate. Although other steps in the development of this issue were very important, these steps can validly be singled out as the most essential.

In summary, policy is usually defined through a series of specific events. Although we focused on such activities as committee and subcommittee hearings we did not intend to imply that these are the only significant events. A particular government body will follow its own format for making decisions. The point is to illustrate two principles for this stage in the development of an issue.

First, in the political process a period for discussion of an issue is usually designated. A lobbyist must see that the policies s/he endorses are discussed during this period. *Prior* to this stage of issue development, attention may focus on creating a general awareness of a proposed policy and encouraging a particular perspective favorable to the lobbyist's position; yet, discussion is unlikely to be successful in influencing detailed aspects of a policy. *After* this stage, when the objective is to enact or implement a policy, revising details may be difficult.

Second, the events that lead to a final policy decision are not equally significant. In fact, the issue may be decided on the basis of one or two major events. This does not suggest that other events do not play a role. If that were the case, the event would probably not occur unless it was planned as a political gesture rather than to determine policy. A lobbyist should participate in any activity that influences the issue. When the ability to participate is limited, success is enhanced by targeting the most important events.

Enact a Policy

Issues are generally assumed capable of resolution. A proposed action is not always final or complete; yet, it represents a degree of mutual consent on how to resolve the issue or move toward resolution. Thus, attention is first focused on identifying an issue, and then on developing the detailed policy that will resolve it. Yet, as the issue matures, attention must shift to efforts to promote formal adoption by the appropriate government body.

Achieving formal enactment of a policy can not easily be isolated into a single stage in the development of an issue. As an issue moves through the stage where detailed policy aspects are determined, there are likely to be several points where formal adoption of a proposal is necessary. Such action may occur when a subcommittee, a committee, or the full membership of a legislative body votes either for or against a proposal. Although each decision is important, their consequences become more significant as the issue moves closer to its final resolution. When debate over the details begins to yield a specific proposal, steps to formally adopt the proposal are begun. In other words, the enactment stage is intermingled with the policy-determination stage. Moreover, there is a transitional nature to this interaction, wherein the lobbyist's goal slowly shifts from establishing a particular policy to seeking its final enactment.

After each major step, a vote may occur to determine whether the proposal has sufficient support to be passed to the next level. However, failure to receive enough votes to pass during the early development of an issue will not necessarily end debate on the subject. A subcommittee for example, may vote on a proposal to see how much support exists for the general approach to resolving the issue. If the proposal passes, the subcommittee has met its goal. If not, the issue may still be alive because the subcommittee can negotiate a new proposal. Even when the subcommittee cannot agree on a proposal, there are still opportunities to debate it in the full committee or in the full membership of a body (i.e., a floor vote in the Senate). However, the opportunity to reconsider a defeated proposal, or to hope for a more favorable vote by a higher jurisdiction, diminishes as the proposal evolves toward its final form. Ultimately, an issue must achieve a favorable vote that will pass it out of the decision-making process and into the implementation stage.

As a lobbyist plans to attain a particular policy objective, s/he must study the likely development of the issue and determine where decisions can be lost, and where winning a key vote will be required, and where an issue can be won. The final vote must, of course, be favorable, but, winning a major vote earlier in the process may, for practical purposes, assure adoption. Since a proposal is likely to contain

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more than one specific policy, a lobbyist should recognize when a particular segment of the proposal is sure to be accepted so that s/he can focus on uncertain elements. Likewise, by recognizing that an element of a proposal faces certain defeat the lobbyist can attempt to delete or compromise that aspect to avoid jeopardizing the entire issue resolution.

Summary

Three major aspects or stages of issue development have been discussed: introduction, mediation, and resolution. That is, an issue must be properly identified; the policy(s) intended to resolve the issue must be determined; and the final proposal must be adopted by the appropriate institution(s). Each stage serves a limited purpose. The introduction of an issue is intended to gain recognition and to establish a desired perspective on its general character. During the mediation stage, various proposals may be debated to determine policies to resolve the issue. In adopting a resolution to an issue, the debate will eventually shift from decisions on how to resolve it to a decision on the acceptability of a proposed resolution.

From the grass-roots perspective, these stages of development are not always clearly visible. The news media tends to focus on an issue after a resolution has been proposed. Thus, the general population sees the issue as a question of enacting or defeating a specific proposal. To effectively influence public policy, one must break away from the misconception that an issue is won or lost in the final vote. The last vote is essential—just as the last inning of a baseball game must be played; but one cannot consider all the previous steps or innings as irrelevant. A good lobbyist will recognize that the resolution of an issue is achieved through a series of limited steps. At each step, certain objectives must be attained. Careful attention to the purpose of each step cannot guarantee success; but lack of such attention will usually limit success or cause outright failure.

4. A Grass Roots Movement

The previous sections outlined the fundamental structure of government and the manner in which an issue proceeds through it, to encourage taking a broad view of government and how it may be influenced. One must recognize all the government components that affect the attainment of a policy to succeed at implementing an objective. Likewise, it is necessary to influence all stages of development for a given issue to achieve (or defeat) policies. However, these are not the most important points that can be drawn from the discussion.

The Lobbying Team

An issue may arise because of lack of a government policy, an ineffective policy, or an undesirable policy in an area of concern. To replace, revise, or create policy, the problem and its fundamental cause must first be identified. Then, the type of action needed to resolve the issue must be determined; that is, can government best resolve the issue by creating a new law (a legislative function), or by drafting new regulations based on current law (an administrative function)? Finally, what level(s) of government (local, state, or federal) should be involved in resolving the issue?

As the issue takes shape, many other factors arise. The potential options for resolving the issue must be reviewed. A particular option must be selected by blending political feasibilities with the technical merits of a policy. For instance, attendant care can be delivered through vastly different methods, including the traditional health model where the service recipient is treated as a "patient," and the social service model which stresses the recipient's independence. Although one method of resolving the issue may be more desirable, another method may be more feasible. Thus, successfully achieving a good public policy will require both technical information on an issue and political information on the government body that will act on it.

These are just a few indications of the amount of information needed to influence public policy; yet, they reveal the most fundamental element of lobbying. *One individual cannot know everything about attaining an effective policy.* Furthermore, even if a person did possess a general awareness of what must be done, it is unlikely that s/he would have the time, ability, and opportunity to perform all the necessary functions. Lobbying should therefore use a team approach.

Before suggesting how a grass-roots movement can pull its resources (people) together into an effective team, it may be useful to stress the role of the average person. Some lobbying functions may seem mysterious to one who is unfamiliar with government procedures. However, most of the functions involved in successful lobbying are fairly commonplace. Albeit by definition, a grass-roots movement is a coordinated operation of average citizens. Thus, grass-roots lobbying efforts will mainly require talents typical of "average" individuals.

The activities for any issue include: specifying the problem (i.e., lack of affordable attendant-care services), researching past and/or present government policy, gaining a consensus among consumers on the desired policy objective, and influencing government to adopt and implement the policy objective.

A team of lobbyists must include individuals with different talents. Someone must understand the structure of government and the political process. Likewise, someone must know the technical elements of an

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issue. Others are needed to perform functions such as testifying. Those who form the backbone of a team by performing administrative functions like publishing newsletters or supportive functions like delivering written testimony to the proper office in a timely manner are also important.

In most cases, the concerns of one community are not unlike the concerns of others; therefore, we can learn from the experience of others. For instance, a group in Wisconsin might look to California or Massachusetts to learn about attendant-care services since these states have well developed programs. On the other hand, they might exchange information with consumers in Pennsylvania because that state is currently trying to create attendant-care services. Thus, by expanding the focus from a limited geographical community to the broader national community with a common concern — the rights of disabled persons — a movement can acquire necessary information.

Whether a lobbying team relies on educating its own members or looking to similar communities for assistance, it is important to train people with a grass-roots viewpoint rather than simply to rely on professionals who vend their services. Most government bodies publish information for laypersons on how they operate. What is not written can be learned from talking with staff members or public interest organizations that work with particular government bodies. Although a consumer who learns through this method may lack some refined lobbying talents, s/he can compensate for this with the knowledge and insight gained as a consumer.

Guidelines For Strengthening a Movement

The biggest challenge for a grass-roots campaign is organizing the raw potential of its membership into a disciplined movement. When a policy objective requires action at the state or national level, this principle should be considered in terms of the interaction of organizations rather than individuals. Thus, in the formation of either a community group or a state and national coalition, internal operations and discipline are priority concerns. Much can be said about organizing a grass-roots movement, but most discussions relate to four basic areas: planned growth, professional attitude, utilizing all assets, and internal cooperation. A movement may exist to bring government attention to an important social need, and it may endorse valid policy, but success in the political process requires more. The following paragraphs highlight the fundamental elements that must be incorporated into a successful grass-roots political movement.

Planned Growth

Essentially, planned growth means long-range planning for success. As a group addresses an issue, it determines what steps will achieve the desired action by government. Whether the goal is to attain a new policy or to defeat a proposed policy, the group must plan well in advance for the critical events that will decide the issue. At the same time, the group must review its resources and begin planning such matters as who will testify at the appropriate times and what funds are available for travel. When such long-term planning is overlooked the chances of success are reduced. Since a grass-roots movement usually follows informal management procedures, it is critical to make as many decisions as possible well in advance of a major event so that last-minute decisions can be focused on policy concerns rather than on housekeeping matters.

Professional Attitude

The basic nature of a grass-roots movement is to encourage the participation of all concerned individuals. The emphasis on the role of the layperson, however, is not intended to imply an absence of professional conduct. The political process grants significant opportunities for citizen participation and acknowledges that people have different talents and degrees of sophistication. Nonetheless, certain standards of conduct are demanded from all participants. In general, professionalism involves performing functions in a timely manner, keeping commitments, and doing so in a polite and respectful manner. Above all, a grass-roots lobbyist must recognize that "public indignation" over a policy is a fact that may be expressed to a politician, but rarely can it be demonstrated! In sum, how a movement presents information can be as important as what information is presented.

Using all Assets

If you cannot decide whether a glass of water is half full or half empty, then don't try to assess the pros and cons of using a grass-roots approach to lobbying. Both advantages and disadvantages exist, just as there are advantages and disadvantages in other approaches. On the positive side, a grass-roots group is sure to have the best intuitive understanding of the issue; after all, nobody knows more about the true impact of a public policy than consumers. As for the negative side, it is best to forget, ignore, or deny it. The key to success is accentuating one's strength: focus on it, draw from it, build on it, believe in it.

Each community group or state/national coalition must assess its own set of strengths to determine how it can be most effective. In this self-evaluation process, try not to be limited by the status quo. Too often,

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an individual involved in a lobbying effort who is a potentially strong witness will be overlooked simply because another individual has always served as a spokesperson. This is poor strategy.

The "general purpose" lobbyist has a very limited role in a grass-roots movement. Failure to bring educated consumers into action, using, instead, a "spotlight hero" who lacks detailed knowledge of the issue, bypasses the most significant asset of a grass-roots movement — street knowledge. Also, as pointed out in Part I of this document, repeated appearances before a single government body will destroy the potential advantages of a witness' "shock" value. Accordingly, a coalition of consumers must assure that the spokesperson for a major event is selected according to merit, not according to the status quo.

Internal Cooperation

The success of a grass-roots movement is commonly determined by a group's ability to convince government that its position is the "people's" position. In some cases, a group can project that image simply by presenting the issue through a consumer spokesperson. Yet, as government becomes more aware of the consumer population involved, politicians are likely to wonder whether a true movement exists, or whether a small group of consumers have created an appearance of one to meet their own purposes.

On the surface, it might seem that a true movement could generate substantial numbers of letters from constituents and/or obtain policy endorsements from involved public-interest organizations. Yet, quickly generating these actions is often difficult. Constituents cannot be expected to send meaningful comments to a member of government unless they have been briefed on the issue in language they understand. Thus, time and resources (printed material, postage, etc.) are required to generate constituent action. Similarly, public-interest organizations need to review the issues before they endorse a policy, and usually follow a time-consuming procedure to produce a formal endorsement.

The practical implication involved in clarifying the depth of a movement is that a group must establish its credibility as soon as possible. In general, this can be achieved by working with constituent groups and organizations throughout the development of an issue. Such a procedure is likely to create broad-based support for the issue and will open doors for the primary group that has drawn attention to the subject.

Realistically, planned cooperation among individuals and organizations with common interests will not occur without significant effort by everyone involved. Usually, failure to work with others results from insufficient time and energy being spent. Building working relationships requires attention that members might prefer to use influencing the

political process. Yet, neglect of this action can seriously jeopardize the success of a movement.

Unfortunately, the absence of cooperation among individuals and organizations is not always due to neglect. At times, a group may purposely isolate itself in an attempt to "own" an issue. It is valid for a group to take a leadership role to enhance the development of an issue or bias the objective of a movement. However, an attempt to exclude groups with common concerns is certain to destroy the movement's credibility. For example, consider a domestic situation where a married couple is fighting. Naturally, a neighbor would be wise not to meddle. Similarly, a politician will not want to step into the middle of a fight between constituent groups. In a political situation, agreement on policy is preferable, but a professionally presented disagreement is not necessarily a serious threat to a movement. If, however, a group challenges the character or ability of another group, the movement as well as the immediate issue can be in trouble.

When a group fails to emphasize cooperation with others, it unnecessarily limits its own potential. To avoid internal arguments, generate broad-based support, and gain access to newsletters and other forms of communication that can tremendously enhance your effectiveness. Cooperation, therefore, is essential to avoid conflicts and to enhance the strength of a movement.

The Independent Living Movement

Throughout the seventies a very significant grass-roots movement has been developing. Commonly referred to as the "independent living movement," it has dramatically demonstrated the ability of consumers to influence public policy. Addressing all levels of government, the movement has generated not only an awareness of the needs associated with disability, but has attained major public policies that recognize the rights of people with disabilities.

If a single characteristic can account for the success of this movement, it is the ability of its participants to work within the political process. Beginning with involvement at the local levels of government, the consumers accepted the system as the rational vehicle to meaningful change. They did not, however, restrict their actions by adopting any preconceived stereotypes of how to lobby. Members of the new movement structured their participation in government to enhance their strengths and circumvent their shortcomings.

At times, the movement operated in a manner dangerously close to being unlawful and unacceptable. Yet, by maintaining respect for the system as a whole and by operating within the formal political process whenever possible, the movement gained credibility. By the late seventies the grass-roots participants had matured in both technical and

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political ability. Armed with an awareness of how the political process operates (i.e., understanding the structure of government and how issues are resolved within it), the movement became effective in lobbying inside government rather than outside via demonstrations or other activities.

With the advent of the eighties, the movement is entering a critical stage. Local communities cannot be effective without acknowledging the dominant role of the federal government. Likewise, national coalitions cannot be truly effective in attaining federal policies without strong support from the community level. The challenge confronting the movement is very fundamental. That is, those "grass-roots" participants of the seventies must work to retain their consumer identity as they become professionals in the eighties. The combined efforts of laypersons and consumer-oriented professionals working within the grass-roots movement can assure the increasing strength of the independent living movement well into the future. To do this, the movement must continue to develop grass-roots "lobbyists." Such lobbyists may not operate in traditional roles, but will rather function as consumers and average citizens who recognize their ability to significantly affect public policy!

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READER RESPONSE FORM

The Institute for Information Studies is committed to producing the most useful and current information on rehabilitation topics for disabled consumers and other members of the rehabilitation community. Therefore, we seek to identify your interests and needs, and to determine how we can improve our publications. The information you give us will be used to select relevant topics and channels for promotion and distribution for the coming year. We would greatly appreciate your completing the form below by checking the appropriate spaces corresponding to your situation.

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| ☐ 02 State rehabilitation agency (blind) | ☐ 06 Disabled consumer organization |
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| ☐ 99 Other organization (please describe) _____ | |

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